



Yellowstone Airport Market Analysis

Prepared for: Yellowstone Airport
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Background

In December of 2008, Yellowstone Airport, located at West Yellowstone, Montana, undertook a project to increase awareness of the Yellowstone Airport and reverse the trend of declining emplanements. The first phase of the project was an Air Service Analysis, delivered in June of 2009. This document serves as the next phase: an analysis of market challenges, opportunities and recommendations.

Situation Analysis

Yellowstone Airport is unique among Montana's airports offering full service and a runway comparable to the Butte airport. Air service is seasonal to one commercial hub, Salt Lake City. While it serves a small and geographically isolated community, the airport is only two miles from the most popular entrance to Yellowstone National Park, where roughly one million visitors pass through each year.

The airport is operated by the State of Montana as a self-funded, independent entity. Commercial service has been available seasonally for over 40 years, but minimal marketing or public information about the airport has been distributed.

Yellowstone Airport has been at a disadvantage not only in its lack of Internet presence, but also because of the dearth of other branding and marketing efforts. Due to its operation as a state entity and its location on Forest Service land, even minimal efforts such as signage have been lacking. Many people in the community of West Yellowstone—even marketing managers at lodging facilities—do not know the airport has commercial service, or were unaware of its location. A recent sign placed along the highway should help local residents know the location of the airport, but much more exposure in the community is needed. Misperceptions of the airport as a “smoke jumper” site (because of Forest Service signage) have existed for years.

Interviews in the community of Island Park showed better awareness of the Yellowstone Airport than in the community of West Yellowstone itself. Several of the businesses in that area reported that they recommend the airport at West Yellowstone to their guests or clients.

Competitors

Primary competing airports are:

- Bozeman, MT
- Jackson Hole, WY
- Cody, WY
- Idaho Falls, ID

Travel and convention planners, lodging facilities and other businesses in the area tend to recommend Bozeman's Gallatin Field as the nearest airport. The drive from the airport to West Yellowstone is 91 miles,



over one of Montana's most treacherous canyon roads. Some of these business spokespersons recommend the Bozeman airport because WYS is seasonal, and it's simpler to recommend one airport.

There is an existing perception in the community that the prices at Yellowstone Airport are higher. However, the Air Service Analysis showed that Yellowstone Airport had the lowest average fare paid in 17 of its top 20 markets, when compared with competing airports at Cody, Jackson Hole, Bozeman and Idaho Falls.

Other comments were that "Car rental is cheaper in Bozeman than at West Yellowstone." Research into car rental prices showed that renting a vehicle at Yellowstone Airport is NOT more expensive than at Gallatin Field, or at the airport in Idaho Falls.

Cody, Wyoming has branded its airport as "the closest airport to Yellowstone Park." The airport named "Yellowstone Regional Airport" often overshadows Yellowstone Airport in online search engine results.

The Air Service Analysis in Phase I of this project concluded: "The current air service (at WYS) does not even scratch the surface of the vast pool of potential inbound traffic and pales in comparison with Cody and Jackson Hole."

Internet Presence

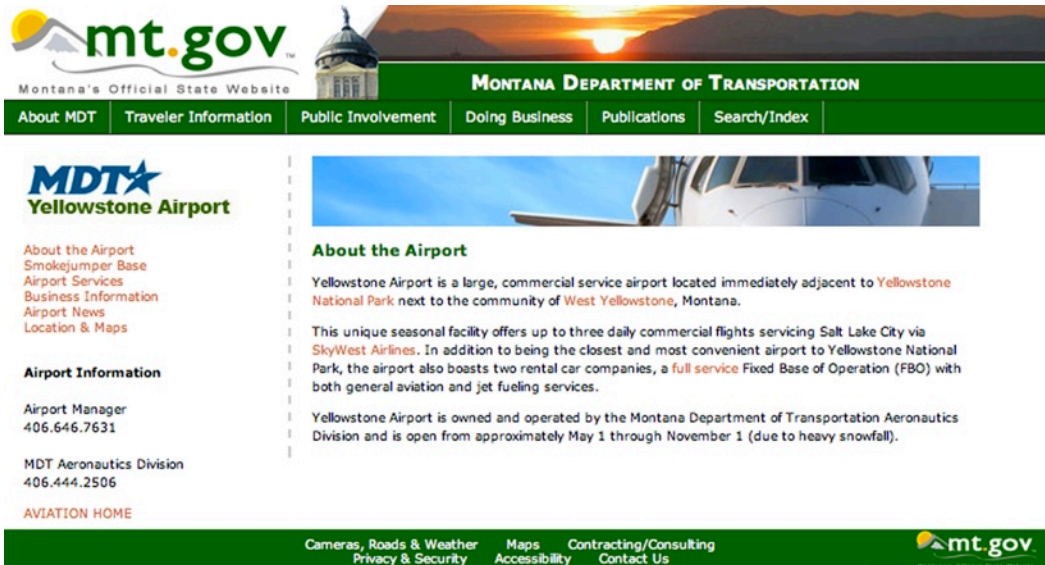
At least 66 percent of leisure travelers use the Internet to plan some portion of their trip, compared to 35 percent in 2000, according to a study of 1,590 travelers in February and co-authored by Ypartnership and Yankelovich, Inc. The study finds that US travelers visit search engines such as Google, Yahoo or MSN first (34%) when considering vacation destination alternatives. The web sites of specific countries or destination boards are visited next (23%), followed by online travel agencies such as Expedia and Travelocity (22%). Consumers' search behavior has changed in recent years as people have become more familiar with search technology, and the number of travel planning/purchasing sites has grown exponentially.

The most recent research from the University of Montana's Institute for Tourism and Recreation Research shows that 46 percent of visitors to Yellowstone Park get information from the Park web site.

The official park web site <http://www.nps.gov/yell/index.htm> does mention the season service from Salt Lake City, under "directions" in their downloadable trip planner. A Wyoming-based web site, www.yellowstonepark.com only mentions the airport at Cody. The Xanterra maintained site, www.travelyellowstone.com, also only mentions the airport at Cody. www.yellowstonenationalpark.com is West-Yellowstone oriented, but it not as up-to-date or content rich as some of the others.

The airport's primary Internet presence is a single page several clicks down on the State of Montana web site, under the Montana Department of Transportation Aeronautics Division.

<http://>



mt.gov
Montana's Official State Website

MONTANA DEPARTMENT OF TRANSPORTATION

About MDT | Traveler Information | Public Involvement | Doing Business | Publications | Search/Index

MDT Yellowstone Airport

About the Airport
Smokejumper Base
Airport Services
Business Information
Airport News
Location & Maps

Airport Information

Airport Manager
406.646.7631

MDT Aeronautics Division
406.444.2506

AVIATION HOME

Cameras, Roads & Weather
Privacy & Security

Maps
Accessibility

Contracting/Consulting
Contact Us

mt.gov
Montana's Official State Website

About the Airport

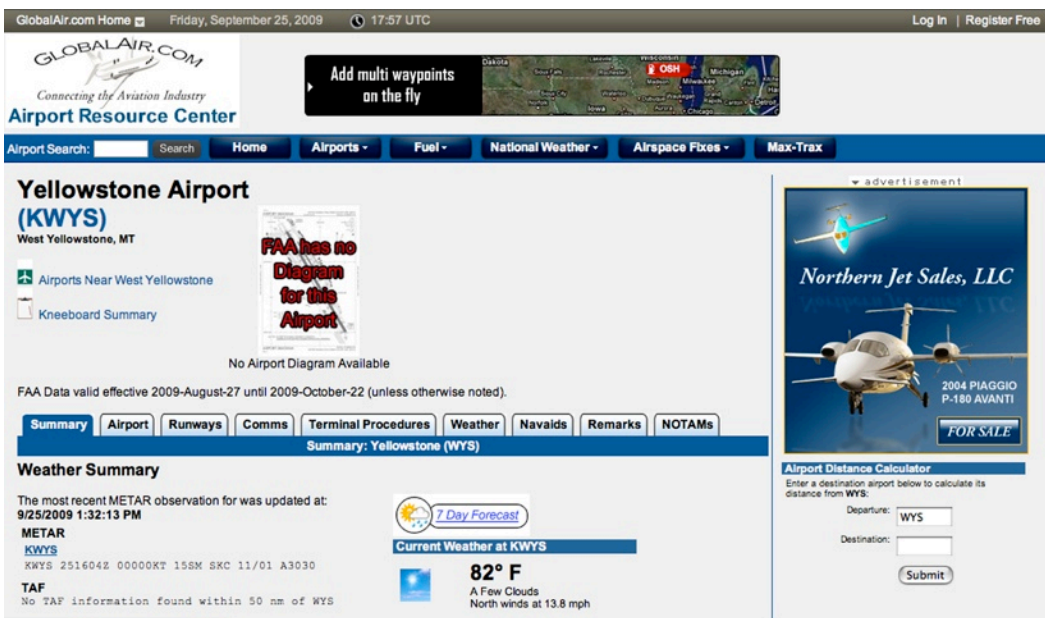
Yellowstone Airport is a large, commercial service airport located immediately adjacent to **Yellowstone National Park** next to the community of **West Yellowstone**, Montana.

This unique seasonal facility offers up to three daily commercial flights servicing Salt Lake City via **SkyWest Airlines**. In addition to being the closest and most convenient airport to Yellowstone National Park, the airport also boasts two rental car companies, a **full service** Fixed Base of Operation (FBO) with both general aviation and jet fueling services.

Yellowstone Airport is owned and operated by the Montana Department of Transportation Aeronautics Division and is open from approximately May 1 through November 1 (due to heavy snowfall).

www.mdt.mt.gov/aviation/airports/yellowstone/about.shtml

A list of Montana airports on the MDT web site takes a West Yellowstone airport inquiry to this page, which appears to be short on content:



GlobalAir.com Home | Friday, September 25, 2009 | 17:57 UTC | Log In | Register Free

GLOBALAIR.COM
Connecting the Aviation Industry
Airport Resource Center

Add multi waypoints on the fly

Airport Search: Search | Home | Airports - | Fuel - | National Weather - | Airspace Fixes - | Max-Trax

Yellowstone Airport (KWYS)
West Yellowstone, MT

Airports Near West Yellowstone
Kneeboard Summary

No Airport Diagram Available

FAA Data valid effective 2009-August-27 until 2009-October-22 (unless otherwise noted).

Summary | Airport | Runways | Comms | Terminal Procedures | Weather | Navals | Remarks | NOTAMS

Weather Summary

The most recent METAR observation for was updated at: 9/25/2009 1:32:13 PM

METAR
KWYS
KWYS 251604Z 00000KT 15SM SKC 11/01 A3030

TAF
No TAF information found within 50 nm of WYS

7 Day Forecast

Current Weather at KWYS

82° F
A Few Clouds
North winds at 13.8 mph

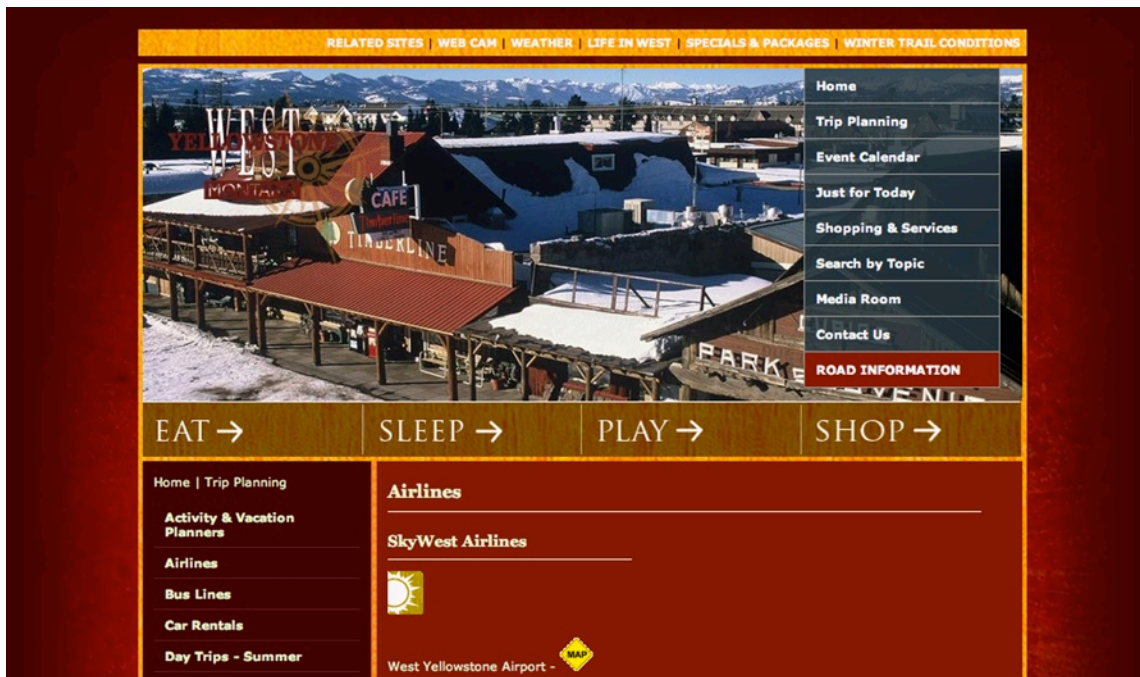
Northern Jet Sales, LLC
2004 PIAGGIO P-180 AVANTI
FOR SALE

Airport Distance Calculator
Enter a destination airport below to calculate its distance from WYS.

Departure: WYS
Destination:
Submit

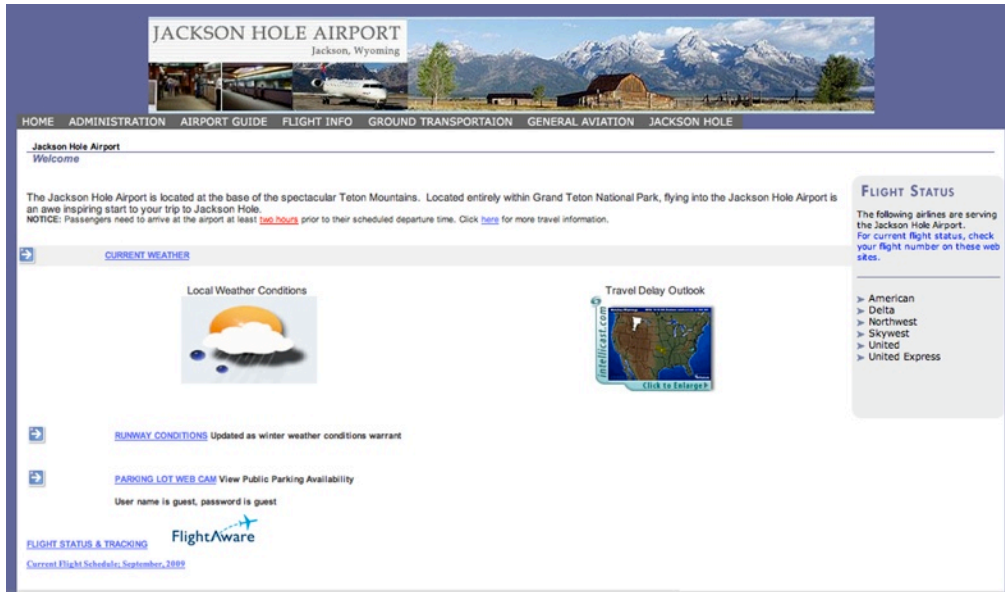
<http://www.globalair.com/airport/yellowstone/WYS.aspx>

One of the beset supporters of the Internet presence of the airport at West Yellowstone is the West Yellowstone Chamber of Commerce. Their site includes one of the most complete descriptions of the airport available on the Internet.

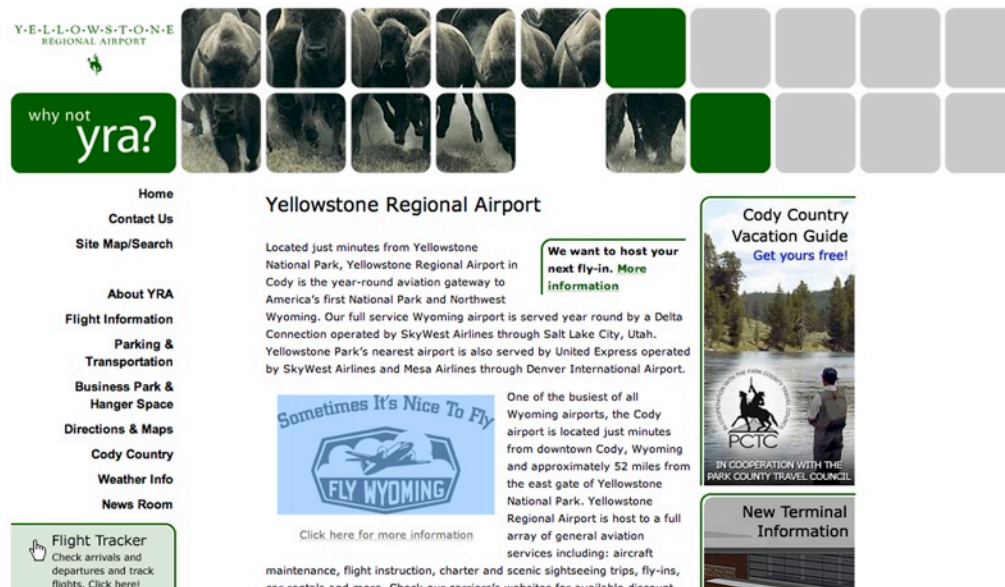


<http://www.westyellowstonechamber.com/trip-planning/airlines>

Competitors Jackson Hole and Cody each have their own web site, with numerous links to information. Note that Wyoming has a logo for promotion of air service in the state.



<http://www.jacksonholeairport.com/>



<http://www.flyyra.com/index.php>

On the Travel Montana web site, <http://visitmt.com/>, web sites for all of the tourism regions in Montana are linked under "Explore Montana's regions and towns." On that page, there is a moving map that distinguishes the regions. When you put your cursor over that region, a small moving plane indicates where the airport or airports are located. In the Yellowstone region, there is only one moving airplane over Bozeman...no airplane that moves to West Yellowstone Airport.

The airport at West Yellowstone is mentioned on the site however, and is also mentioned where appropriate in the Montana Travel Planner. The Yellowstone Travel Planner states that visitors to the Park should look at kiosks and other traveler's information available on their way to the Park. Perhaps opportunities exist for information about the airport to be posted.

Interviews with Key Informants (Lodging and Outfitters)

The busy season for most lodging facilities is the summertime; primarily the months of June through September. Among the total number of lodging facilities that Banik Communications talked to, less than 3% said winter was their busy season.

All of the outfitters and lodging facilities did at least some kind of marketing. Types of marketing included online advertising (web site, Facebook, Twitter), brochures, billboards, radio, magazines, Yellow Pages and through Travel Montana.

When asked if West Yellowstone Airport was included or mentioned in any of their marketing pieces, over half of the respondents said, 'No.' Their reasons were simply because they had not thought of it, or their guests rarely fly into West Yellowstone.

On a positive note, many of the respondents who don't mention West Yellowstone Airport in their marketing materials said they would have no problem adding it, if content was supplied. Almost all with summer clientele said they would not be opposed to mentioning West Yellowstone Airport to let their existing/potential guests know that it is another option for getting to West Yellowstone. A few reported that, on occasion, a lodging guest had complained that they had not been informed there was an airport so close by.

Island Park

Among the catchment communities, it appears from local interviews that Island Park residents and businesses are more aware of the air service available at Yellowstone Airport than those in West Yellowstone. The fact that the airport offers seasonal service only in the summer seems more of an issue with West Yellowstone than with Island Park residents.

Island Park is only a community in very loose terms, with small but respected lodging and outfitter services, a number of vacation homes and timeshares. The Yellowstone Airport has also indicated that the Island Park Chamber of Commerce would be an effective partner in projects to market the airport. After on-site visits to Island Park,

a combined partnership with the Chamber and the Island Park City Office (off of Highway 20) might be a more appropriate partnership.

Big Sky

During the summer, the primary purpose for most Big Sky visitors is meetings and conventions. However, no information is provided to these guests or attendees that the closest airport is at West Yellowstone. Most of these gathering are planned by outside corporations and associations.

International Guests

Our survey included asking respondents what percentage of international guests they get during a year. On average, these particular lodging facilities and outdoor outfitters receive approximately 7.3% international guests per year. Some were less; some were more. Most responses ranged from an estimated 5 to 15 percent.

Several respondents mentioned that more and more of their guests were coming from Montana and neighboring states. They thought, perhaps, this had to do with gas prices. In general, though, polled outfitters and lodging facilities said their guests come from all over the country. Many mentioned guests from the California, the east coast, Texas and other southern states. Neighboring states, such as Wyoming, Idaho and Utah seem to be an increasing customer base for many of these businesses.

Marketing by State Tourism Boards and Other Partners

The tourism-marketing arm of the State of Montana, Travel Montana, includes an emphasis on marketing to national parks visitors in their strategic plan. Yellowstone Park is the number two attraction for nonresident visitors to Montana.

Travel Montana has undergone a recent brand development process that resulted in a new brand platform of three planks. One of these brand statements is pertinent to the community of West Yellowstone: "Vibrant and charming small towns that serve as gateways to natural wonders." Travel Montana is also focusing on first-time visitors, which is a strategy compatible with Yellowstone Airport goals.

Wyoming has also heightened their focus on brand, and has turned to new technologies for tourism marketing. They have been very successful in increasing the number of inquiries from potential visitors and targeting international travelers. One of their successful strategies has been public relations via the Internet; this is a strategy that can also be effective for Yellowstone Airport.



The West Yellowstone Chamber of Commerce has emphasized marketing to the Utah market for the last several years. Data from various sources appears to show an increase in Utah visitors to the Park. In our marketing recommendations, we should be aware that this is a natural market due to the Salt Lake City Delta connection; however, Utah can also be considered a drive market. A motorist can drive from Salt Lake City to West Yellowstone in less than 5 hours.

Target Markets

Yellowstone National Park is a tremendous attraction. Yellowstone Airport's natural market is the recreational traveler who wants to visit Yellowstone National Park. California provides the largest segment of out of state visitors to Yellowstone National Park, and the largest percentage of arrivals at Yellowstone Airport. Visitors from Utah comprised the second largest segment. According to data from the Yellowstone Park Visitor Study in the Summer of 2006 (*National Park Service Social Science Program, University of Idaho, Park Studies Unit, Visitor Services Project, Report 178, June 2007. Authors: Manni, Littlejohn, Evans, Gramann & Hollenhorst.*)

US visitors were from California (12%), Utah (10%), Idaho (5%), Colorado (5%), Washington (5%), Texas (5%), and 43 other states and Washington, D.C.

International visitors, comprising 10% of the total visitation, were from Canada (25%), Netherlands (17%), Germany (10%), United Kingdom (9%), Italy (7%), and 17 other countries.

The Air Service Analysis prepared by the Boyd Group found that seven of Yellowstone Airport's top ten markets are in California. They also found that 72 percent of 2008 air traffic went to Southwestern US destinations.

Note: A change in the SkyWest schedule out of Salt Lake City was implemented in late June, to better accommodate travelers from other regions of the US – which may account for what could be a higher percentage of Eastern US passengers in 2009.

Audience Segmentation

The Yellowstone Park Visitor Study in the summer of 2006 reported that the majority of visitors to the Park come for the purposes of a “scenic drive” and “wildlife watching.” These are clearly benefits of Yellowstone National Park, but are general to visitors, including those who travel in their private vehicles. The initial marketing effort for the airport should aim at more narrow, specialized activity segments of the target markets.

These are target audiences that we can address with benefits unique to the air traveler. An example is the fly fisherman:

“Leave San Francisco in the morning and be on the Madison River by lunchtime.”

Another viable audience segment is photographers: a group that may be hobbyist or professional; travels with equipment that can fit on a plane; and who can find unique scenic and wildlife subject opportunities in the Park, no matter where they are from. The Yellowstone Airport/West Yellowstone survey conducted in 2009 showed that a significant number of visitors (41% overall; over 43% of WYS passengers) list photography as a reason to visit the area.

Hiking was another frequent response in the Yellowstone Airport/West Yellowstone survey at over 49 percent; day hiking is reported by about one-third of visitors who come to Yellowstone Park who do not also visit Glacier Park.

Through the opportunities the Internet offers – the medium where the airport marketing effort must be stepped up – we can target a variety of special-interest groups, from bicyclists to birdwatchers. With the limitless possibilities of the Internet, the particular appeal of convenient summer travel to Yellowstone National Park can be marketed to a variety of groups.

Nonresident Anglers

Using data from the Institute for Tourism and Recreation Research at the University of Montana, visitors to Montana who indicated fishing as an activity appear to have a likelihood of visiting West Yellowstone.

- 15% entered the state through Targhee Pass near West Yellowstone
- 8% entered through West Yellowstone
- 49% visited Yellowstone National Park



The largest segment of these anglers come from California, followed by Washington, Idaho, Utah and Colorado. They tend to travel as self or as a couple, and almost half have household income levels of \$80,000 a year or higher. More than 80 percent are repeat visitors and almost all plan to return within two years.

Of all visitors to Yellowstone National Park who did not also travel to Glacier Park, 17% reported fishing as an activity. In ITRR vacation planning studies, fishing as an intended recreation shows an increase during the months of July – September.

Fly-fishing outfitters and guides are the predominant summer sporting adventure available in West Yellowstone. Fly-fishing also has a significant retail presence in the community. The marketing efforts of these businesses vary greatly, but there are notable tech-savvy bloggers among local fly-fishing experts.

Second Home Owners

Owners of a vacation home in the area appear to be somewhat more likely to fly into Yellowstone Airport, just as campers are less likely. The audience segment of vacation homeowners should be addressed, especially in the area of Island Park where there is a significant number of second homes or time-shares.

Information received from the sampling of guest ranches and lodging facilities showed that many of the businesses are already fully booked during the summer season corresponding with commercial flights at Yellowstone Airport. Targeting vacation home owners to bring new passengers to the airport would make sense in light of the current market, and would have the added efficiency of promoting to a market of repeat users.

Target Audience

- Adults age 35-65
- Higher end household income
- Couples
- Appreciation of scenic beauty, wildlife

Slightly more than half of the visitors to the park were age 35-65, and most were couples (household of 1-2 persons). Based on the survey of SkyWest passengers this summer, the family market does not appear to be appropriate for the airport's marketing effort.

The largest segment of nonresident visitors also had a household income of \$60,000 or more. These demographics also overlap with the demographics of the nonresident angler, who may come to Montana as an individual or as a couple.

Strategies

The marketing budget for Yellowstone Airport is extremely modest for a national campaign. However, by narrowly targeting primary audiences in California and the southwest, and by advertising to specific audience interest groups, such as fly-fishermen, and maximizing potential exposure on the Internet in cost-effective ways, Yellowstone Airport should see a significant improvement in awareness and emplanements over time. Other recommendations include continuing the essential efforts of building connections in the community that will expand local awareness and partnership development with local businesses who are willing to help place Yellowstone Airport in the consciousness of visitors to the area.

Develop a Brand for the Yellowstone Airport

An organization's brand reflects all of the perceptions and expectations that are held in the public mind for that institution. The airport at West Yellowstone has been at a long-term disadvantage in terms of public perception of the facility. There is an existing attitude that the airport is a less-valued asset to local businesses and the greater area since it is a seasonal facility.

Development and implementation of a brand strategy should address the important benefits and attributes of the Yellowstone Airport:

- WYS is a commercial airport with flights connected by SkyWest/Delta
- WYS is a full service airport
- WYS has a runway capable of handling large aircraft



Research shows proximity to destination is key in the selection of a commercial flight. Proximity to the Park is the airport's greatest benefit, yet Cody's Yellowstone Regional Airport is marketed as "The airport closest to Yellowstone Park." The short distance to Yellowstone Park must be included in the branding strategy and crafted to successfully compete with Yellowstone Regional Airport. Cody says they are "Minutes" from Yellowstone; Yellowstone Airport can say it is "Two Minutes" from Yellowstone National Park.

Key benefits echo those of the park itself, with an added benefit that flying into Yellowstone Airport gets you to these natural wonders and recreation opportunities faster.

The high level of customer satisfaction revealed in the Summer 2009 survey lends support to a branding message of customer service.

The characteristics of the airport are quaint and scenic - it is a destination. Yellowstone Airport is one of the world's best-kept secrets, a scenic getaway at the very doorstep of the world's first national park.

Elements of brand development:



- Determine brand strategy and platform
- Distill the brand platform into an effective positioning statement/tagline
- Develop a graphic expression of the brand: a logo
- Propagate use of the airport logo, tagline, photos, map and defining paragraph on web and print materials
- Upon finalization, brand content materials should be shared with local businesses willing to mention the airport on their web site or in collateral materials
- Develop advertising materials that implement the brand strategy

Develop a Web Site

Yellowstone Airport must have a web site of its own, following guidelines for State of Montana management, approvals and implementation of the site. Banik Communications would collaborate with the State in developing a site that provides richer content, specific appeal to our target audiences and carries through the airport's branding strategy.

The web site is the second step in the marketing materials development, and should take place as soon as possible. Print and Internet marketing should not be implemented until the web site is live.

Utilize Internet PR Distribution and Tracking Service

While the lack of exposure on the Internet has been detrimental to the awareness of the airport, the power of the Internet is such that it can also be turned into the greatest advantage. New tools that allow widespread distribution of news releases to thousands of print and online publications and web sites will help us get the story out and increase awareness of Yellowstone Airport. The methods of distribution and tracking that we propose are the same that were used by the State of Wyoming to increase their tourism inquiries 244 percent.

In collaboration with the airport, local businesses and other partners, we will create a series of "stories" to be released to targeted media on the Internet through PRWeb and other services. Benefits to specific target audience groups will be written into each story.

Increased mentions of keywords will increase the visibility of the airport in search engines. Links back to the web site will also create additional traffic.

Target Psychographic Markets Through Magazine Advertising

Print advertising to reach national markets is very expensive, but a judicious use of the marketing budget will allow us to reach special interest segments such as fly-fishermen and photographers. Recommended publications include:

- Backpacker
- Big Sky Journal
- Fly Fisherman Magazine
- Fly Fishing & Tying
- Montana Magazine
- National Geographic Traveler
- Northwest Flyfishing
- Outdoor Photographer
- Rocky Mountain Game & Fish
- SkyWest Magazine
- USA Weekend
- West Yellowstone Vacation Planner

To reduce costs, Banik Communications suggests that West Yellowstone Airport propose a partnership with SkyWest. In exchange for putting the SkyWest logo in all other magazine ads purchased by the Airport (effectively advertising the only commercial flight into West Yellowstone), WYS would receive free advertising space in the *SkyWest Magazine*



Web Site Advertising

Costs for web banner and e-mail newsletter ads are based on either a one-time fee for distribution to opt-in subscribers, or a rotating banner ad on the website. For advertising through Google, the amount of ad exposure would be set by a budget limit and specific costs would be monitored for each search term. The Internet makes it easy for anyone to search for travel information and will give us the ability to attract travelers who are looking at flying into West Yellowstone. Also, like magazine advertising, we are able to reach special interest segments.

Recommended sites include:

- AARP: www.aarp.com
- All About Fishing: www.aa-fishing.com
- Discover America: www.discoveramerica.com
- Google: www.google.com
- Montana Magazine: www.montanamagazine.com
- Outdoor Photographer: www.outdoorphotographer.com
- The Real America: www.rmi-realamerica.com
- Rocky Mountain Game and Fish Magazine: www.rmgameandfish.com

Rack Card

A significant number of visitors to Yellowstone National Park are repeat visitors. Marketing efforts should take the opportunity to address visitors who are already in the area and tell them: "Next time, fly to the park!" The proposed budget does not include paid placement for rack card distribution; but unpaid locations such as the Visitor's Center should be sought. Again, this is a tactic that the airport would ask local partners to support by displaying the cards.

The airport manager and Montana Department of Transportation staff could also use the piece as a handout for appropriate audiences.

Strengthen Connection With the Community and Develop Partnerships

The airport has worked diligently to include the business community in a project to eventually expand air service, and partners have already been developed. From interviews with many local businesses, additional opportunities for combining marketing efforts at various levels have been identified. Business partners and the local Chamber of Commerce have been involved, but the citizenry should also be included. Events and publicity efforts should continue to include the West Yellowstone community so that local residents become more aware of the airport's benefits, to them and the local economy.

Celebration of the 75th Anniversary of Airmail Service to West Yellowstone

An ideal opportunity to forge increased awareness and support in the community of West Yellowstone will occur in June of 2010. The first airmail flight at the airport at West Yellowstone took place on June 22, 1935. June 22, 2010 is a Tuesday – so a community celebration might be scheduled for the weekend before or after.



Local partners and the airport should be enlisted to help organize the event. Assistance in organization and publicity efforts has been offered by Kendra Owen, granddaughter of Sam Eagle, the postmaster and owner of the Eagle Store in West Yellowstone who helped spearhead the establishment of an airport in West Yellowstone.

We see this as a town celebration. It should definitely be an event *with* the community, and help solidify recognition of the airport's connection with local people and businesses. However, the Montana Department of Transportation, the Director of the Montana Department of Transportation and the Aeronautics Division could clearly have a role in giving the event greater stature. After all, the establishment of an airport near the world's first National Park is significant on a national or global level. Invitations should be sent to appropriate state and federal dignitaries. This celebration also gives an ideal opportunity to counter the Cody airport's claim to be closest to the Park.

In fact, the event could have a transportation focus. The Yellowstone Historic Center is already planning an exhibition. Obviously, the Post Office should be involved. General aviation FBO should also be included. A fly-in could be planned, with antique planes on exhibit.

Kendra Owen has also suggested inviting tribes and dancers to participate. American Indian artist Jackie Bread will do a signature release pouch for 2010 "Honoring flight."

Eagle Store will surely be involved. Other retailers and outfitters would be invited to make the event a part of their 2010 marketing or special promotions. An article in Delta's Sky Magazine should be promoted.

This is a golden opportunity to create a dramatic upsurge in awareness of the airport.

Organizing the Event



The 75th Anniversary Celebration could be a major event, so the scale of planned activities needs to be determined as soon as possible for the greatest impact. Organizational tasks should be shared among all interested parties, and certainly there is potential for commercial benefits from the event.

For purposes of the marketing budget proposed along with this document, we've added a modest amount for helping to coordinate the event. This might include developing an invitation, an e-card, and alerts to media, a press release and helping to formalize an agenda. Much of the organizational work and planning would have to come from the airport, the Chamber, or other local partners.

A second line item for the event (under the Option Two budget) is "promotional items." This could cover some costs of imprinted giveaways with the new logo of Yellowstone Airport. The airport should also plan for costs for banners, decorations, other signage and possibly a display at the facility for the period prior to and during the celebration.

Conclusion

Yellowstone National Park hosted a record number of visitors this summer, almost 2.3 million people. The opportunities exist for the airport at West Yellowstone to have a greater share of these travelers through increased awareness in the marketplace.

The ultimate strategies and tactics for the effort to market Yellowstone Airport will be determined in collaboration with the Montana Department of Transportation, airport management and key partners. Optimized partnerships with the air carrier, the community and area businesses will be a cornerstone of the finalized plan.

The major expenditures of the plan will be in advertising and public relations directed at targeted markets. Identification of these markets has been determined in part through the Air Service Analysis developed by The Boyd Group and by the results of a survey of SkyWest passengers to the airport and West Yellowstone visitors in a three-week period of the summer of 2009. Results of that survey follow here.

Yellowstone Airport/ West Yellowstone Summer 2009 Visitor Survey Executive Summary

Prepared for: Yellowstone Airport
Prepared by: Banik Communications

September 23, 2009

Methodology

A postcard survey was developed by Banik Communications of Great Falls, Montana to explore and measure the awareness and usage of the Yellowstone Airport (WYS) among a pre-determined target market segment that included people flying into and out of the airport, and people staying at various lodging facilities in and around West Yellowstone, Montana. The list of accommodations and lodging was representative of the area, with a cross section of hotels, motels, campgrounds, guest ranches and resorts. A secondary objective of the study was to examine the interest in having Yellowstone Airport services extended to shoulder months or the winter.

The survey was administered from approximately July 29 to August 20, 2009. A total of 517 responses were collected within the target demographic; 331 from those who flew into and/or out of the West Yellowstone airport, and approximately 186 from respondents who arrived via some other form of transportation or flew into a different airport. All respondents answered survey questions one through twelve, as well as zip codes. Questions thirteen through sixteen specifically addressed flight services specifically, so were only answered by SkyWest/Delta Connection passengers.

Summary of Results

- More males flying into WYS responded to the survey (58.4%) as opposed to females (41.6%). All age demographics were well represented in the study. The highest percentage of responses was in the 45-54 year old group (21.0%) followed by the 55-64 year old age group (19.4%).
- The largest percentage of WYS respondents traveled in parties of two people (38.8%) followed by those traveling alone (28.8%). Parties of two also represented the largest segment of respondents staying seven days or longer (37.0%) in the area. The largest percentage of WYS respondents (43.3%) planned to spend seven days or longer in the area.
- Almost forty-five percent of respondents flying into or out of West Yellowstone Airport indicated that this was their first visit to Yellowstone Park and 30.9% had visited the Park five or more times.
- Most respondents who flew into the area indicated they had flown into West Yellowstone directly, with Bozeman being the second most common arrival airport. When asked how many times they had flown into and/or out of the Yellowstone Airport, 60.6% of those respondents stated it was their first time while 24% had used that airport five or more times.
- Yellowstone Park was the primary destination for 61.5% of those surveyed at Yellowstone Airport. West Yellowstone was named as the second most common destination (57%) and Island Park was the third at just over 16%. Those who chose "other" listed other Montana and Wyoming communities, more specific locations within Yellowstone Park, both Glacier and Grand Teton National Parks, as well as the Madison River area.
- The largest percentage of WYS respondents listed recreation as the purpose of their trip (70.8%) with 38.2% choosing family and friends as the main reason for visiting. Those who said the reason for the trip was "other" listed the following: home, summer home, live in the area, job, vacation, golf, holiday, seasonal work, family trip, bear watching, retail business meeting and the Yellowstone Park wolf center.

- When Yellowstone Airport passengers were asked what activities they planned during their visit, the highest percentages chosen were: sightseeing (70.5%), hiking (51%), photography (43.6%) and wildlife (42.4%). Write-in activities reported under “other” included: work, family, horseback riding, working in the park, rafting, firefighting, boating, walking, biking, fishing, staying at a cabin, living in the area, attending a wedding, speaking at 1959 Earthquake Commemoration, water skiing, visiting friends, racing and motorcycling.
- The largest percentage of respondents flying directly into WYS planned to stay, or had stayed, at a hotel (34.3%). Those who choose “other” listed: guest of family, stayed with friends, cabin, RV, rental, private ranch, motel, apartment, town house, vacation house and bed and breakfast.
- For those who flew into or out of WYS directly, the most common reason for choosing that flight was that it was near the respondent’s destination or origination point (81.7%). Only .6% of WYS respondents chose “quality of the airport facility” as their primary reason. When asked how often per year they used the air service at West Yellowstone, 81.3% of respondents said they used it one to two times per year while 8.1% used it three to four times per year.
- Over eighty-nine percent of WYS respondents said they would fly the SkyWest/Delta Connection into and/or out of Yellowstone Airport again. This figure adds credibility to the over fifty written comments that praised the level of service, friendliness of staff and great experience the respondent had when flying into or out of Yellowstone Airport on SkyWest/Delta Connection flights. Specific comments included: “great service,” “pleased with everything” and “we enjoy wonderful service out of West Yellowstone.”
- Two hundred and ninety-seven people out of the three hundred and thirty-one surveyed at Yellowstone Airport answered the question regarding whether they would use Yellowstone Airport air service if it operated in May, October and/or Winter. All 297 indicated that they would, at some level, use the expanded air service. The highest percentage (36.4%) said they would use it in May, October and Winter, favoring year-round air service out of Yellowstone Airport. Table 1 below summarizes the breakdown of air service usage responses.

Table 1. Potential usage of Yellowstone Airport during May, October and Winter

Would use Yellowstone Airport if it were open:	Number of Responses	Percent of Responses
May	60	20.2%
October	18	6.1%
Winter	35	11.7%
May and Winter	10	3.4%
May and October	59	19.8%
Winter and October	7	2.4%
May, October and Winter	108	36.4%
Totals	297	100.0%

- There were many handwritten comments regarding the last question on the survey, which pertained to how the flight could be improved. A few were very generic complaints regarding baggage fees, on-time departures and the noise and/or size of the aircraft. More specific suggestions included: the need for better food service in airport, need for more flights into Yellowstone Airport, year-round service, offering decaffeinated coffee on the flight, more flights available, more frequent flights, the need for runway lights in winter, the availability of maps in plane seat pockets showing points of interest (lakes, mountains, etc.) around Yellowstone Park, and a free or low cost shuttle to West Yellowstone.

Conclusions

Most survey respondents were traveling in parties of two or smaller (66%). Couples or individuals may be more likely to fly into the airport than family groups.

Zip code information from all survey respondents (see Attachment A) provides interesting insights, even though a sizable portion of respondents failed to include their home zip code. More than 45 percent of those surveyed were from locations east of the Mississippi, and almost 30 percent were from the Eastern seaboard. It may be that recent changes in the connecting flight scheduled allowed more Eastern passengers to find the flight convenient. California, Utah and Texas appear to be the highest interest markets, with the largest percentage of visitors coming from California. California, Nevada and Arizona travelers tended to be predominantly couples.

There was not a high level of WYS airport use by residents of the West Yellowstone community during the survey collection period. Only 9 of the 338 zip code reports came from Montana residents (6 from West Yellowstone; 1 each from Bozeman, Helena and Townsend). Only one reported zip code corresponded to Island Park, ID.



There appears to be a high customer satisfaction level with current flights into and out of Yellowstone Airport, as indicated by the many positive comments and the relatively small number of complaints about flight service. There is definite support and interest in having the airport open other months, with one hundred and eight respondents expressing interest in using it year-round. As one respondent put it: "full service would be wonderful and we would use it every year during the winter."

Attachment A
Yellowstone Airport/West Yellowstone
August 2009 Visitor Survey
Zip Code Responses

622	1	0.19%
1004	1	0.19%
1020	1	0.19%
2299	1	0.19%
2675	1	0.19%
3860	1	0.19%
4463	1	0.19%
5271	1	0.19%
6441	1	0.19%
6517	1	0.19%
7307	1	0.19%
8053	1	0.19%
8854	1	0.19%
10000	1	0.19%
10012	1	0.19%
10019	1	0.19%
10023	2	0.39%
10025	2	0.39%
10282	1	0.19%
10603	1	0.19%
11020	1	0.19%
11215	2	0.39%
11566	2	0.39%
12866	1	0.19%

20871	1	0.19%
20878	1	0.19%
20886	2	0.39%
21029	1	0.19%
21863	1	0.19%
22033	1	0.19%
22134	1	0.19%
22301	1	0.19%
22406	2	0.39%
22554	2	0.39%
22560	1	0.19%
22902	1	0.19%
23185	1	0.19%
24211	1	0.19%
24293	1	0.19%
25570	1	0.19%
26017	1	0.19%
27615	1	0.19%
27705	2	0.39%
28210	1	0.19%
28226	1	0.19%
28232	1	0.19%
28412	1	0.19%
28670	1	0.19%

31811	1	0.19%
32127	1	0.19%
32130	1	0.19%
32501	1	0.19%
32607	1	0.19%
33161	3	0.57%
33181	1	0.19%
33414	1	0.19%
33458	1	0.19%
33785	1	0.19%
35186	2	0.39%
35213	2	0.39%
36117	1	0.19%
37075	1	0.19%
37205	2	0.39%
37343	1	0.19%
37398	1	0.19%
37416	1	0.19%
37748	1	0.19%
38149	1	0.19%
40076	1	0.19%
40123	1	0.19%
41094	1	0.19%
42066	2	0.39%

14009	1	0.19%
14228	1	0.19%
14502	1	0.19%
14607	1	0.19%
16148	1	0.19%
16327	1	0.19%
16801	1	0.19%
16841	1	0.19%
17057	3	0.57%
19057	1	0.19%
19139	1	0.19%
19143	1	0.19%
20068	2	0.39%
20176	1	0.19%
55419	1	0.19%
59601	1	0.19%
59644	1	0.19%
59715	1	0.19%
59758	6	1.15%
60010	1	0.19%
60045	1	0.19%
60134	1	0.19%
60137	1	0.19%
60435	1	0.19%
60448	1	0.19%
60536	1	0.19%
61273	1	0.19%

29379	1	0.19%
29401	1	0.19%
29403	1	0.19%
30005	1	0.19%
30062	1	0.19%
30080	1	0.19%
30120	1	0.19%
30125	1	0.19%
30161	1	0.19%
30305	1	0.19%
30306	2	0.39%
30324	1	0.19%
30345	1	0.19%
30441	1	0.19%
77399	1	0.19%
77401	1	0.19%
77478	1	0.19%
78501	2	0.39%
78572	1	0.19%
78640	1	0.19%
78736	1	0.19%
78852	1	0.19%
80002	1	0.19%
80003	1	0.19%
80120	1	0.19%
80127	1	0.19%
80215	1	0.19%

42084	1	0.19%
43204	1	0.19%
43551	1	0.19%
44202	1	0.19%
45505	2	0.39%
46052	1	0.19%
46168	1	0.19%
46703	1	0.19%
46807	2	0.39%
47371	2	0.39%
48306	1	0.19%
48430	1	0.19%
48438	1	0.19%
49010	1	0.19%
84108	3	0.57%
84109	2	0.39%
84116	2	0.39%
84117	2	0.39%
84121	1	0.19%
84403	1	0.19%
84414	1	0.19%
84601	1	0.19%
84770	2	0.39%
85029	1	0.19%
85032	1	0.19%
85048	1	0.19%
85205	2	0.39%

62301	1	0.19%
63122	1	0.19%
64111	1	0.19%
66215	1	0.19%
67230	1	0.19%
70070	1	0.19%
70737	1	0.19%
70769	1	0.19%
70820	1	0.19%
72625	1	0.19%
73035	1	0.19%
73054	1	0.19%
73703	1	0.19%
74137	1	0.19%
74820	2	0.39%
75013	1	0.19%
75044	1	0.19%
75229	1	0.19%
75410	1	0.19%
75762	1	0.19%
76092	1	0.19%
76133	1	0.19%
76207	1	0.19%
76273	1	0.19%
77005	1	0.19%
77084	1	0.19%
77399	1	0.19%

80220	1	0.19%
80224	1	0.19%
80227	1	0.19%
80233	1	0.19%
80301	1	0.19%
80303	1	0.19%
80634	1	0.19%
80643	1	0.19%
80908	1	0.19%
81504	1	0.19%
81505	2	0.39%
82414	1	0.19%
83263	1	0.19%
83401	1	0.19%
83429	1	0.19%
83686	8	1.55%
83861	1	0.19%
84010	1	0.19%
84015	1	0.19%
84020	3	0.57%
84025	3	0.57%
84029	1	0.19%
84034	1	0.19%
84050	2	0.39%
84070	1	0.19%
84075	2	0.39%
84081	1	0.19%

85254	2	0.39%
85255	1	0.19%
85259	1	0.19%
89032	2	0.39%
89044	2	0.39%
89148	2	0.39%
90291	4	0.77%
90703	3	0.57%
90712	2	0.39%
91354	2	0.39%
91604	2	0.39%
91724	2	0.39%
91789	3	0.57%
92227	2	0.39%
92506	2	0.39%
94043	2	0.39%
94116	2	0.39%
94549	2	0.39%
94602	2	0.39%
94618	2	0.39%
94903	2	0.39%
95630	2	0.39%
97007	2	0.39%
97045	2	0.39%
98036	2	0.39%
98146	2	0.39%

AUSTRIA	2	0.39%
FRANCE	4	0.77%
ITALY	2	0.39%
JAPAN	2	0.39%
SINGAPORE	2	0.39%
TAIWAN	3	0.57%
UK	2	0.39%
Unlisted	179	34.62%
Total	517	100%

Subtotals

International	12
Eastern Seaboard	100
Florida	11
East of the Mississippi	154
Minnesota	1
Washington State	4
Arizona	9
Texas	20
Utah	31
California	40